

From Research to the Frontlines

By SCOTT TOMLINSON, RESEARCH COORDINATOR, MIDDLESEX SCHOOL

After starting my career seven years ago at a small state college wearing a number of hats, including grantwriting, research and event planning, I made the transition to full time research just after my first year in the field. Research seemed to be a field within development that was a growth area, and to be perfectly honest, it seemed like a good way to stay in the field and avoid annual fund work. To learn the ropes, I left the comfortable confines of the small college universe to work at Brown University, which was in the final years of a \$500 million plus capital campaign. The learning curve was steep, but the resources available at a large university and certainly one in a capital campaign were staggering. Although my research was originally heavily weighted toward corporations and foundations, I quickly stumbled onto international research, which I thought were the largest of the untapped resources in the universe of fundraising. I shortly found out why. The research was incredibly time consuming and the information resources were frequently incomplete or so expensive they were not worth the gamble. The explosion of research sources on the internet around this same time made research easier on many levels. It also meant an almost daily search for new sources that could be overwhelming, like never before in the history of research.

I learned a great deal in my years at Brown, and I began to ask where could I go from here? Where could I take my skills and really make an impact? Which brought me back to the smaller schools. I found Middlesex School, a small independent school with 318 students and 3,400 alumni preparing to launch a centennial campaign to raise \$125 million. This was an ambitious undertaking for any size organization, but for one with an undeveloped research program and a capital fundraising staff of six, including the director of research, this was enormous. And an opportunity I just could not pass up.

From my first day at Middlesex, I was included in every meeting. This was a product of having very understanding bosses as well as my desire, as the new guy, to try to learn everything I could about my new organization. Now that may sound unbearable, but it may be the first thing I recommend to a new researcher. After awhile, you can decide which meetings are important for you to attend and which are not, and I advise you to decide and not let someone else decide for you. Especially for those of you in small shops! By making sure that you include yourself in all levels of a shop's operations, you can begin to elevate the level of your position. Let's face it, most directors of development do not come from a research background, which means they are familiar with the end product, but know little regarding how we arrive at that end product. If you are interested in taking your position to a new level as a researcher, or if you think you would like to get involved in other aspects of fundraising, it all begins by attending those meetings.

Proactive Research

At Middlesex, one of my very first moves, after equipping my office to conduct research, was to start looking at new ways to find prospects. By finding new prospects, you can then involve yourself in prospect assignment and management, which I see as the next step up from our research. Prospects are only good if, after we find them, we make sure they are assigned, cultivated and solicited. Follow the process. Don't just research to research. Know the why, where, and how! Ask questions! As a new researcher, I think that may have been one of my biggest mistakes and one I may not have been aware of until very recently.

Transition to Fundraising

My transition to near full-time fundraising has been made in several steps over a number of years. During my first year at Middlesex, I managed my first reunion

class. This is a process that involves the management of volunteers and the occasional solicitation. In any case, it introduced me to writing solicitation letters and working with class agents, two invaluable lessons. Like any new steps, this was a bit daunting at first, but like writing your first research report, you get used to the process.

After that first successful year, I convinced people that I should have a few prospects of my own, starting with a few members of the class I had just managed. There was already a relationship there, so it made picking up the phone a little easier that first time. And I would highly recommend traveling, just locally if possible, on a few visits with a seasoned development officer for your first few visits. Actually, that said, even if you never intend to make the career move out of research into the "frontlines," I think making a few visits with a seasoned development officer is a great idea. On my first few visits, I learned a great deal about the process which helped me understand the need for certain levels of research. Even if I were to never make another visit, what I learned on just a few visits truly made my research better as I gained a better understanding of my audience and their needs. Again, asking just a few important questions (such as the ones below) helps you get better information into the hands of the people who need it on the frontlines.

Who is going to be reading the research?

Your audience is very important. I have yet to meet a volunteer or development officer who thinks they need a six-page research document for a cultivation meeting. A one page brief should suffice. Development officers are generally used to operating (or should be) with less information than a high level volunteer, who may need more detailed information just to put them at ease.

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From the Frontlines to Research

By CAROL BYRNE, DEVELOPMENT RESEARCH CONSULTANT

While some may see a logical career path as development researcher to fundraiser, it may not be as obvious why a fundraiser would move from the frontlines to the research department. This may be due to the common belief that the two roles are generally filled by individuals with somewhat different interests or skill sets. The two positions, however, do require some of the same skills. By evaluating where one's interests lie and transferring skills from one job to the other, a fundraiser can move from the frontlines to research.

Maureen Kilcommins, director of prospect research/management at Bentley College, began her career in higher education on the fundraising side of the development house. After graduating from college, Kilcommins worked at Harvard Law School, where she started as a staff assistant in the annual fund. She was subsequently promoted to assistant director and then associate director. With each position, her job duties increased, although her main objective still dealt with the reunion giving program. In this setting, each reunion fund officer had a portfolio of reunion classes and was responsible for recruiting and managing volunteers, writing solicitation materials, identifying top prospects, and developing solicitation strategies for leadership donors. "I was on the road, visiting and soliciting alumni, in addition to having administrative responsibilities in such areas as stewardship, pledge fulfillment, and the class agent program," Kilcommins said.

After five years at Harvard Law School, Kilcommins moved to the University of California, Santa Cruz (UCSC), where she served as director of annual/special gifts. For three years, she oversaw the fundraising activities of the annual giving program (phonathon, reunion giving, trustee giving, direct mail, and volunteer management). In addition to her duties as a fundraiser, Kilcommins had a supervisory role; she managed a three-person

staff in annual giving, as well as the stewardship department's two staff members.

Impacting Central Development Needs

Kilcommins' job descriptions show progressively increasing responsibility for both fundraising efforts and the management and supervision of various staff. While at UCSC, Kilcommins really broadened the scope of her development work, and learned that her interests were shifting. "My involvement in [the UCSC] development program went beyond the typical annual giving functions and I was able to impact central development needs," she says. This included coordinating the solicitation and stewardship efforts of all the campus units "to ensure an integrated approach to [the] constituents." Kilcommins also served on the department's database conversion team and designed new systems for annual giving, prospect tracking, pledge fulfillment, acknowledgement, and donor society membership. "This gave me insight into the systems side of the house and an increased appreciation for the functionality of the alumni donor database," Kilcommins said. "I found that I was enjoying the behind-the-scenes work, and was getting less satisfaction from the demanding cycle of annual giving work."

Thus, when the opportunity arose to change jobs, Kilcommins weighed the pluses and minuses of her experiences. "I thought about what I enjoyed doing most and also about what I enjoyed doing least in my jobs," she says. "I decided that I no longer wanted to travel for work, I enjoyed working with the database and thinking about strategies for reaching donors, and I wanted to be involved with the larger development effort – not just annual giving. That led me to research."

The Move to Research

As the director of prospect research/management at Bentley since 1999, Kilcommins is in her first research job.

Mainly responsible for prospect management, as opposed to fundraising, Kilcommins found one of her first objectives involved the college's new alumni database. "With the new prospect system came new policies and procedures, so I've been writing a lot of documentation and holding training sessions," she said. Bentley is preparing to enter a campaign, so Kilcommins has also been re-evaluating Bentley's prospect pool.

At Bentley, the research staff includes Kilcommins and an assistant director, in addition to work-study students who help with newspaper screening and various projects. Kilcommins completes research profiles, prepares for prospect management meetings, and occasionally contributes to strategy sessions for approaching prospects. Kilcommins said she's always respected researchers' work; "their input is the first step in soliciting a major gift – know whom to ask. At Harvard Law School, I was fortunate to work with one of the best researchers in the business and it was known by all that he was the one who brought to the table the names of some of the campaign's largest donors," she said.

Transferable Skills

When asked if there are skills which transfer between fundraising and research, Kilcommins responded with a resounding yes. "Fundraisers and researchers are always on the lookout for indicators of wealth," she said. "The researcher does this using their investigative skills, and the fundraiser turns on the asset calculator the moment they enter someone's office and begin a conversation. Also, as a fundraiser, you always try to create a profile of the prospect before going out on a visit, pulling as much information as you can from the database and the central files, so both fundraisers and researchers are skilled in quickly narrowing in on the significant bits of information. Screening for new prospects

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Is the research for a solicitation or just a first cultivation meeting?

Obviously as a prospect works further through a cultivation process towards solicitation, their true capacity becomes more important, usually aided by a development officer's trip notes from meeting with the prospect. These simple questions, for example, can save you valuable time and help target your research.

The advantage of being involved in the prospect management and assignment process is that it makes it easier to get prospects of your own. That is how I started to build a portfolio for myself, which is largely comprised of current parents because that is a population that is not well served by our current campaign staff who already have too many "well qualified" prospects on their radar screens. Since our current parents are a group who experiences a nearly 25 percent turnover every year, and are not

likely – although they sometimes do – to support the school after their child's graduation, one has a very short window of time to explore and solicit capital support. Also current parents are easier prospects to approach initially, as they have a vested interest in the school and conversation points are readily available. Working with current parents, like working with reunion classes, is a good process that prepares you to travel more and to solicit on a more regular basis.

However, as it currently stands, I have not been able to make the transition to full-time "frontline" work, because of the ever-present need for research primarily from our head of school, trustees and volunteers. Although my research load has decreased to roughly 25 percent of my time, this percentage is nonetheless in constant flux and an issue that will probably never be fully resolved. As most of you know, once people in your office

know you have a unique skill in research or running reports, it is not easy to break their reliance on that skill.

Now I understand that my experience does not apply to everyone. I have been very fortunate my position at a small school, in the midst of a large campaign, allowed me to explore new areas. The focus of our work shifted, throughout the school's campaign, as did our need for research. As the campaign neared its end, the need for more development officers in the field increased while the need for research decreased. I was happy to be able to step in and help fill the frontline need. This shift has allowed me to transition to the work of a development officer from the work of a researcher. In any case, whether I decide to stay in research or to work as a development officer in my next position, I think the experiences I have had working in both positions have enhanced my skills.

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is also an area that transfers between both research and fundraising – thinking of new criteria to find the gems in the database is on everyone's mind."

Kilcommins can now see the research function from both sides of the fence, and her experience as a fundraiser influences her work in research. By her own admission, her background as a fundraiser has made her more understanding of fundraisers in her role as a research director, especially when it comes to how and when development uses the information provided by the research office. "As a researcher, you might drop everything to spend two days on a last minute request for a profile and then expect an outcome right away that would justify

your extra work and added pressure. Unfortunately, development work isn't predictable and there might not be an outcome right away, so I've found myself feeling frustrated. Then I remember what it was like to be that development officer – responding to the demands of a volunteer, or scheduling the big meeting that gets cancelled, or having the prospect say they just made a major gift to their spouse's school and won't do anything for you this year. You give [the fundraisers] the tools they need and hope for the best," she said. "Also, by knowing the challenges they face as 'road warriors', I try to be more realistic about deadlines for administrative tasks – you can't get out and ask for money if you are chained to your desk reviewing lists. I've also

tried to find ways to make them more self-sufficient so they can get quick answers to simple questions without having to follow the protocol of research requests."

Kilcommins thinks her past work experience makes for a stronger researcher/development officer relationship. "I benefit from having first hand knowledge of the challenges they face, so I can offer valid suggestions on strategy or segmentation," she says. "The development officers benefit from being able to describe what they hope to accomplish, and then together we figure out how research can best assist them. I think we can communicate better because of the shared background."